



Philanthropic Institute for Professional Advisors

The Philanthropic Institute for Professional Advisors (PIPA) is designed to deepen understanding of the values that drive philanthropy and to help advisors align charitable strategies with client intentions. As client expectations evolve, advisors are increasingly looking to integrate charitable planning into their practice – not only as a value-add, but to strengthen client relationships.

PIPA meets this need by equipping advisors with practical tools, actionable giving strategies, and a peer network to support confident, effective philanthropic conversations.

Partner Organizations

PIPA is a collaboration between the St. Louis Community Foundation, the Jewish Federation of St. Louis, and the Roman Catholic Foundation of Eastern Missouri. These organizations are united in their goal of providing tools to professional advisors that will increase confidence in communicating with clients about charitable giving.



The **St. Louis Community Foundation** serves donors and community for a more equitable and vibrant region. Since 1915, we have inspired purposeful philanthropy that connects community and donors to build and preserve a more equitable and vibrant region, now and forever. The Foundation works collaboratively with donors, funders, and community leaders to tackle regional challenges.



Since 1901, the **Jewish Federation of St. Louis** has mobilized the Jewish community and its human and financial resources to preserve and enhance Jewish life in St. Louis, in Israel and around the world. Our vision is an engaged, vibrant and flourishing St. Louis Jewish community, in which individuals live with dignity, meaning, purpose and a sense of belonging to the Jewish People, as part of a life well-lived.



The **Roman Catholic Foundation of Eastern Missouri** inspires intent-driven giving and connects donors to Catholic ministries. The foundation was established in 2013 with the goal of building endowed funds that will support Catholic parishes, schools and ministries throughout the Archdiocese of St. Louis for generations to come.



Philanthropic Institute for Professional Advisors

**Session One:
Helping Client Families Align with Each other
and their Values, Impact and Legacy**

Presenter: Patrick Sablich, Fifth Third Bank,
National Director Family Wealth Services

Date: *Tuesday, August 11, 2026 | 9:00 a.m.–12:00 p.m.*

Location: *The Jewish Federation of St. Louis*

Session Description:

This session will set the stage by exploring today’s context for effective purposeful planning. We will consider the Great Wealth Transfer – both its risks and opportunities. And the changing landscape of the role of the advisor using the Ten Domains of Family Wealth from the Ultra High Net Worth Institute. We will explore the challenges of generational wealth stewardship, characteristics of thriving families, the important role of philanthropy and how we as advisors can be the catalyst to help families on this journey.

Effective philanthropic advising begins with understanding values—both your clients’ and your own. In this foundational session, participants will explore what motivates charitable giving and how to confidently lead values-based conversations that help clients clarify and achieve their philanthropic goals.

Patrick Sablich will guide participants through practical frameworks for identifying donor motivations, recognizing generational differences in giving, and translating values into meaningful charitable strategies. Participants will also engage in guided reflection to articulate their own philanthropic identity, strengthening their ability to connect authentically with clients.

The session concludes with participants being assigned to Community Connection Project groups, thoughtfully aligned around shared values and interests.

Learning Objectives:

By the end of this session, participants will be able to:

- Identify and clearly articulate their own philanthropic values and motivations
- Recognize common donor motivators and generational patterns in charitable giving
- Confidently initiate and guide values-based philanthropic conversations with clients
- Build trust and rapport by aligning charitable strategies with donor intent

Activity Overview:

Participants will complete a guided values map, designed to surface the beliefs and experiences that shape charitable decision-making.

Using structured prompts, participants will identify:

- Core philanthropic values (e.g., equity, faith, innovation, legacy)
- Personal “spark moments” that influence why they give
- Causes and issue areas aligned with those values

The session concludes by grouping participants into Community Connection Project teams based on shared philanthropic values.

Learning Outcomes:

Participants will leave with...

- Greater clarity around their own philanthropic identity
- Practical tools for uncovering donor motivations
- Increased confidence initiating meaningful charitable conversations
- Stronger alignment between personal values, client engagement, and community impact

Session Deliverables:

Participants will receive...

- Completed personal values map
- Peer feedback on client discovery conversation approach



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**Session Two:
The How – and How Not – of Charitable Giving:
Real World Lessons, Regulatory Realities, and
Advisor “Save” Strategies**

Presenter: Jeffrey Keiser, Chief Legal Officer &
Director of Family Office Services,
Archford Capital

Date: *Tuesday, September 15, 2026 | 9:00 a.m.–12:00 p.m.*

Location: *The Jewish Federation of St. Louis*

Session Description:

Charitable giving can be a powerful tool for achieving both philanthropic and tax objectives—when it is structured correctly. When it is not, even well-intentioned gifts can result in lost tax benefits, compliance issues, donor frustration, and reputational risk for advisors and charitable organizations alike.

In this session, Jeffrey Keiser will walk participants through the “how” and the “how not” of charitable giving, drawing from real-life scenarios and legal case examples. Advisors will explore charitable strategies that may appear straightforward on the surface, but often involve hidden complexities related to valuation, substantiation, timing, and IRS compliance.

Jeff will also provide a concise “what you need to know” overview of the current IRS and regulatory landscape, equipping participants with the foundational knowledge needed to spot red flags early and intervene effectively. The session emphasizes how charitable planning works best when advisors proactively guide donors—protecting both charitable intent and tax outcomes—rather than reacting after problems arise.

Learning Objectives:

By the end of this session, participants will be able to:

- Identify common charitable giving missteps and compliance risks
- Understand key IRS and regulatory considerations that affect charitable gifts
- Recognize early warning signs that a gift may be improperly structured
- Advise donors on compliant charitable strategies that preserve tax benefits
- Intervene effectively when a charitable plan is at risk of failure

Immersive Activity: Red Flag Case Review

Activity Overview:

Participants will work in small groups to analyze realistic case studies of charitable gifts that did not go as planned—including issues such as improper valuations, incomplete documentation, restricted asset complications, and timing errors.

Each case highlights what happens when charitable planning works well versus when it fails, offering advisors a practical lens into how small oversights can have significant consequences.

Participant Tasks:

- Identify the specific risk, misstep, or compliance failure
- Discuss how and when an advisor could have intervened
- Propose a compliant, donor-aligned alternative strategy
- Determine how the revised approach protects both tax benefits and charitable intent

Learning Outcomes:

Participants will leave with...

- A sharper ability to spot and address charitable planning red flags
- Increased confidence navigating IRS and regulatory considerations
- Practical strategies for guiding donors away from costly mistakes
- A stronger understanding of how proactive advisor involvement improves outcomes

Session Deliverables:

Participants will receive...

- Charitable Giving Risk Identification Checklist
- Advisor “Save Strategy” Summary (step-by-step intervention framework)



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Session Three:

Understanding the Giving Glossary: Tools, Vehicles, & Strategic Application

Presenter: Ray S. Kreienkamp, Partner,
Husch Blackwell

Date: *Tuesday, October 13 | 9:00 a.m.–12:00 p.m.*

Location: *The Jewish Federation of St. Louis*

Session Description:

Charitable planning conversations often stall not because of lack of generosity—but because of complexity. Donors look to their advisors for clarity, confidence, and direction. This session will demystify the “giving glossary” by unpacking the most commonly used charitable vehicles and illustrating how they function within broader estate, tax, and legacy planning strategies.

Ray Kreienkamp will translate technical structures into practical insight, helping advisors understand not only how charitable tools work—but when they work best. Through real-world examples and lived case scenarios, participants will explore how different vehicles can be aligned with client motivations, asset types, and family dynamics. The session will also address common misconceptions and planning oversights that can derail otherwise well-intended giving strategies.

Participants will leave with greater fluency, increased confidence, and a practical framework for guiding charitable planning conversations with clarity and credibility.

Learning Objectives:

By the end of this session, participants will be able to:

- Clearly differentiate between major charitable giving vehicles (e.g., donor-advised funds, private foundations, charitable trusts, qualified charitable distributions, gifts of closely held business interests, etc.)
- Match specific giving tools to donor motivations, asset structures, tax circumstances, and legacy goals
- Identify common planning pitfalls and compliance considerations associated with each vehicle
- Translate complex charitable strategies into clear, client-friendly explanations that build trust and confidence

Ray will incorporate short “when it works well / when it doesn’t” real-world examples to reinforce learning and deepen advisor confidence. During the Q&A session, participants will be invited to share fact patterns regarding possible client uses of the various techniques that they are experiencing to allow for group discussion.

Session Deliverables:

Participants will receive...

- A Quick-Reference Giving Vehicle Comparison Guide
- Increased confidence in navigating charitable planning discussions with clarity and precision



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**Session Four: Legacy Planning &
Intergenerational Philanthropy:
A Conversation with Foundation Experts and
Professional Advisors**

Date: Tuesday, November 17 | 9:00 a.m.–12:00 p.m.

Location: The St. Louis Community Foundation

Presenters/Facilitators:

- Shelly Azar, Director, Legacy Giving at Jewish Federation of St. Louis
- Josina Greene, Director of Giving Strategies, St. Louis Community Foundation
- Michael Weisbrod, Senior Gift Planning Officer, Roman Catholic Foundation

Professional Advisor Panel:

- Abigail George, Senior Vice President, Director of Family Office, Busey
- Rene Morency, Corporate, Estate Planning, and Tax Counselor, Trusted Advisor, Pathlight Law

Session Description:

This session explores how philanthropy can serve as a powerful tool for legacy planning, values transmission, and multi-generational family engagement. Foundation leaders from the St. Louis Community Foundation, the Roman Catholic Foundation, and the Jewish Federation will share practical approaches for helping families articulate shared values, establish family legacy funds, and create thoughtful donor succession plans that endure across generations.

Participants will also gain insight into how philanthropic planning can be meaningfully integrated into broader estate and wealth planning conversations. The session will conclude with a moderated panel featuring professional advisors—with backgrounds in financial advising, trust administration, estate planning, and accounting—who will share real-world perspectives on structuring charitable tools and strategies while navigating complex family dynamics, differing generational priorities, and evolving donor intent.

Learning Objectives:

By the end of this session, participants will be able to:

- Facilitate values-based conversations that engage multiple generations
- Understand key philanthropic structures that support long-term family legacy
- Integrate charitable planning into comprehensive estate and wealth strategies
- Recognize common family dynamics and challenges in intergenerational giving
- Collaborate more effectively with philanthropic institutions and fellow advisors

Immersive Activity: Family Legacy Design Lab

Activity Overview:

Participants will work in small groups to develop a multi-generational philanthropic plan for a hypothetical family case study. Each group will be asked to consider the family's values, generational perspectives, financial context, and desired community impact.

Participant Tasks:

- Identify core family values and charitable priorities
- Select appropriate philanthropic vehicles (e.g., family legacy fund, donor-advised fund, designated fund)
- Outline a donor succession and governance approach
- Anticipate potential family dynamics or conflicts and propose strategies to address them
- Determine how philanthropy fits within the family's broader estate plan

Following the professional advisor panel, groups will reconvene to refine their plans using insights shared during the discussion.

Learning Outcomes:

Participants will leave with...

- A practical framework for advising families on legacy and intergenerational philanthropy
- Increased confidence navigating sensitive family conversations around values and succession
- Actionable strategies for aligning charitable tools with long-term family goals
- Enhanced understanding of cross-disciplinary advisor collaboration

PIPA Culmination Reception:

Cheers, Charity, & Reflections – Honoring the 2026 PIPA Cohort!

Date: November 17th, 2026 | 4:00p.m. -5:30p.m.

Immediately following the final session